



Important Questions to Ask when Researching a Project Controls System

Answering the Most Common Project Controls System Questions



Angela Overstreet

Account Executive, ARES PRISM

Angela Overstreet is an account executive for the western region of the United States. She works with project organizations who are on their journey to improve project management processes and operational maturity. Angela enjoys building relationships and working closely with clients to learn how their organization operates. She welcomes the opportunity to answer questions they have about software solutions that would help solve some of their most common challenges.

- **Conduct an internal audit of what systems & processes are in place already**
- **Determine what is missing or needed regarding**
 - Teams
 - Processes
 - Software/Tools
 - Interconnectivity of Data – *Common identifiers across all software systems*

PMIS Functionality Must-Haves



**Planning &
Scheduling**



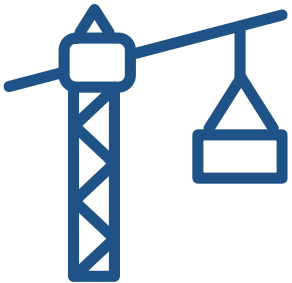
**Cost Management &
Project Performance**



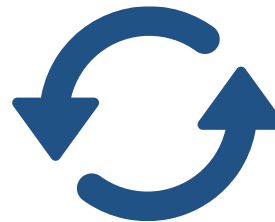
**Budget &
Estimating**



**Project Progress
Reporting**

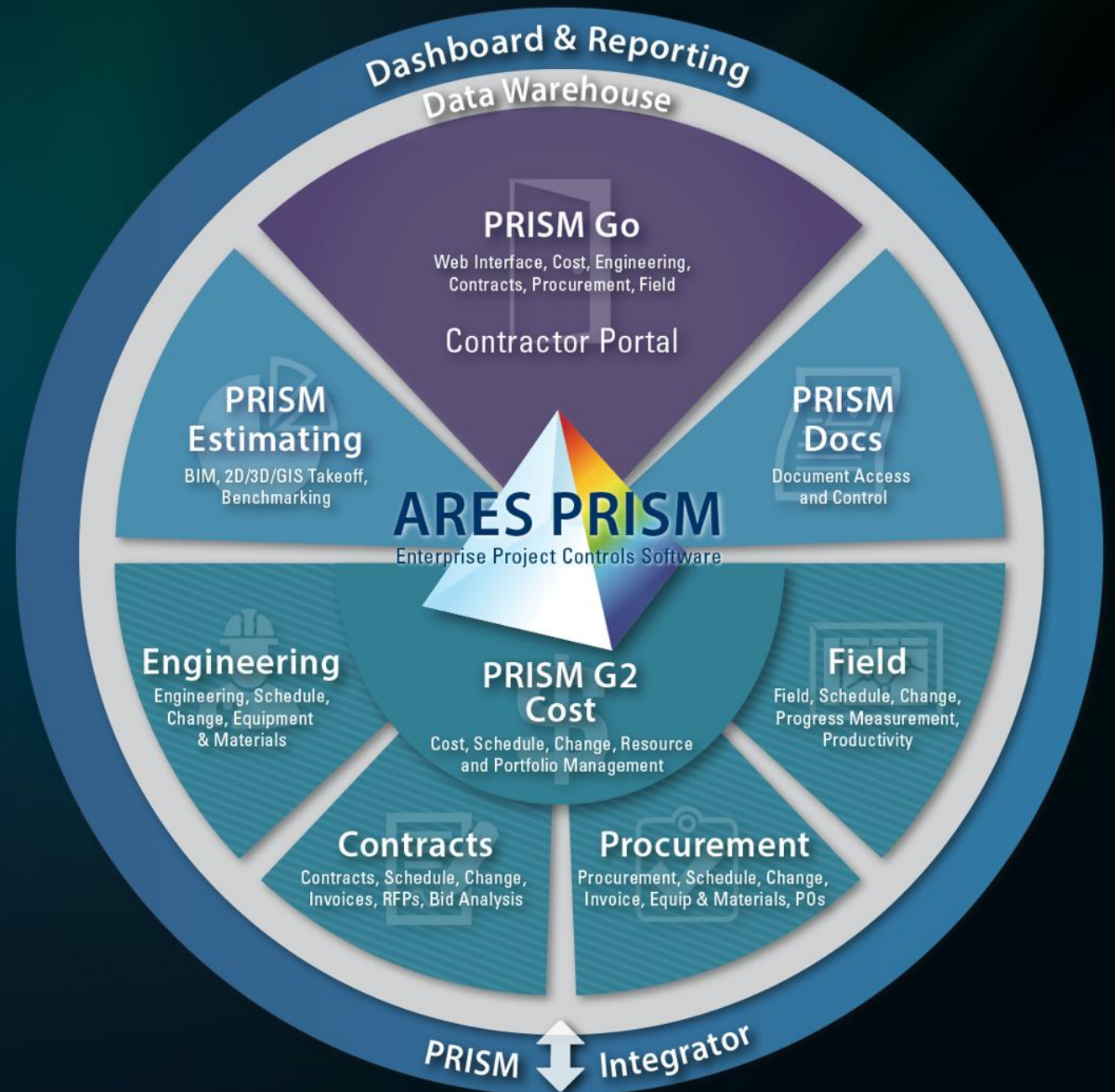


**Resource &
Procurement
Management**



**Data & System
Integration**

ARES PRISM Overview



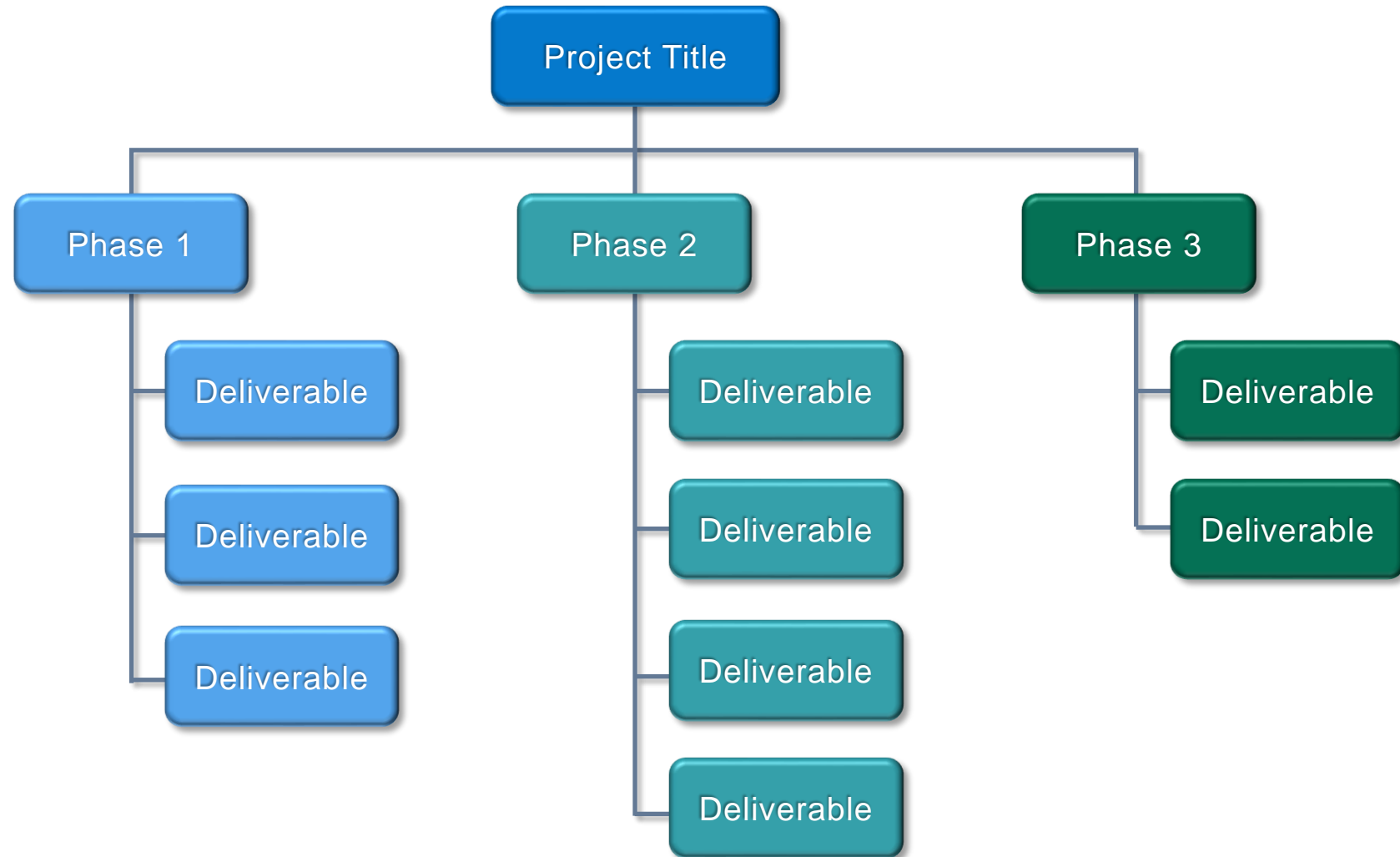
Question #1

Is the system flexible in
the use of coding structures?

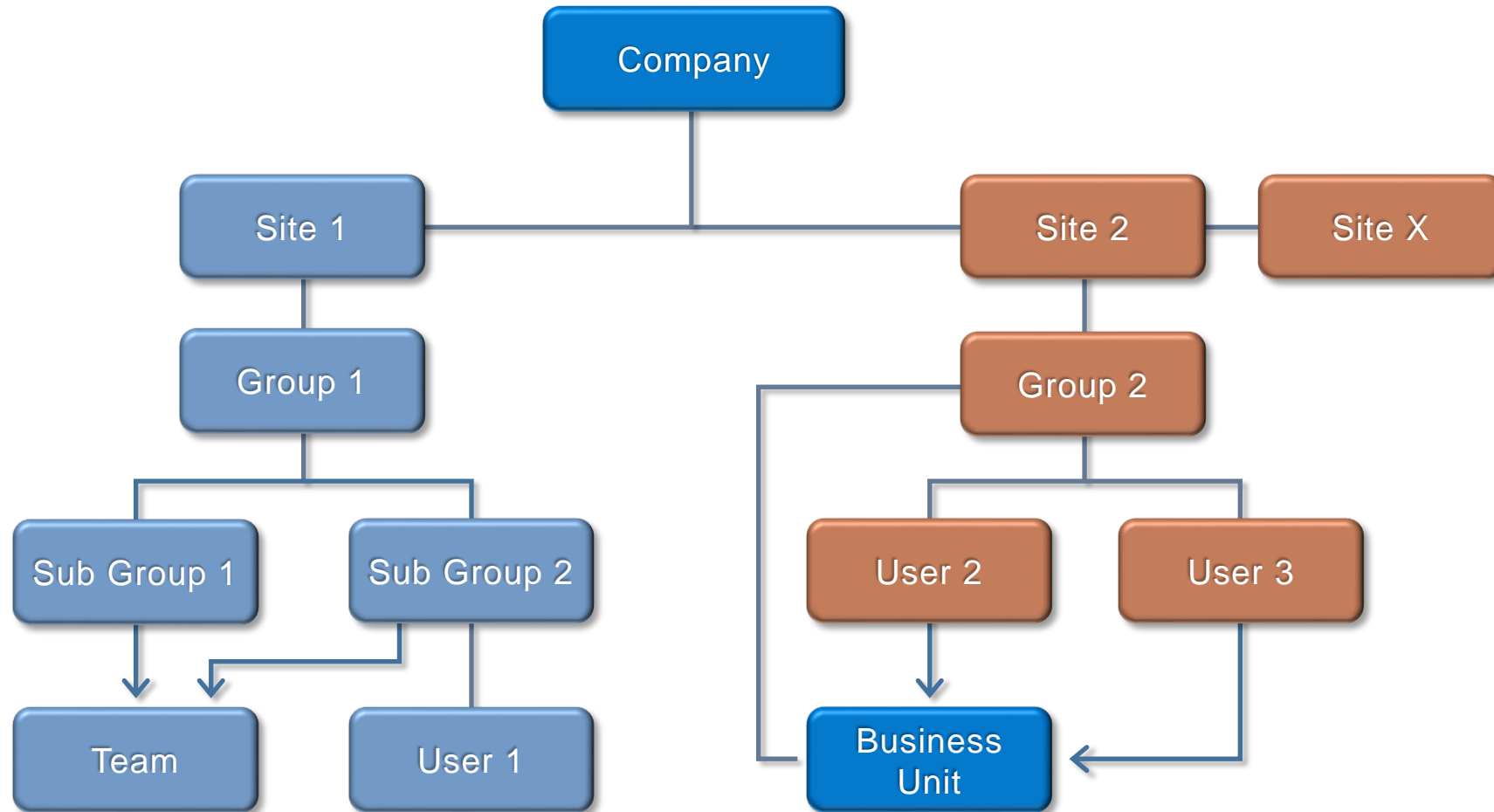
There are three common coding breakdown structures:

1. **Work Breakdown Structure (WBS)** - Is used to visualize the outcomes a project will deliver in a hierarchical structure. It helps project managers break down complex project activities into simple and manageable tasks.
2. **Organizational Breakdown Structure (OBS)** - Groups together similar project activities or “work packages” and relates them to the organization’s structure. Defined at enterprise level and meant to assign a record to a specific entity within the organization.
3. **Cost Breakdown Structure (CBS)** - Is used to allocate cost types to different parts of a project. Used generally to assign a cost category to a record. Defined at enterprise level and can be further customized by project.

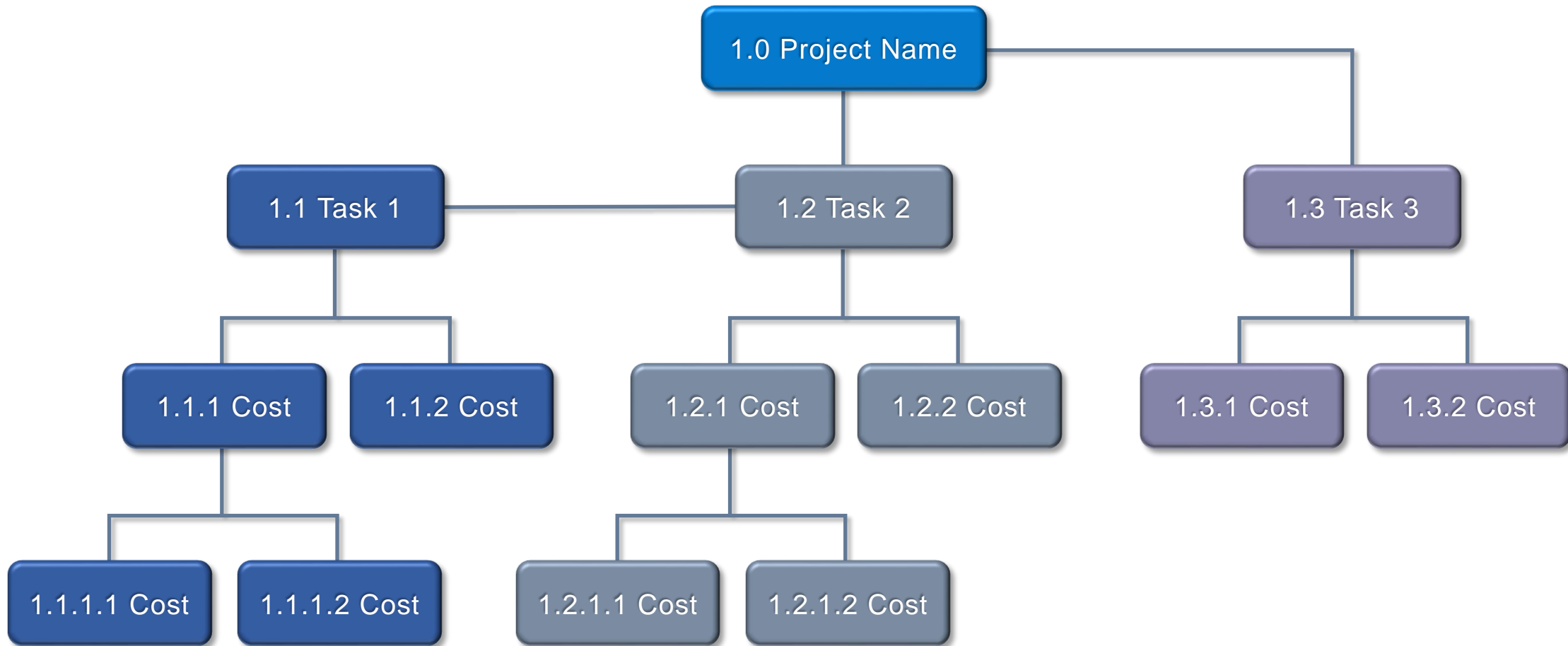
Work Breakdown Structure (WBS)



Organizational Breakdown Structure (OBS)



Cost Breakdown Structure (CBS)



How is Project Data Recorded in the System?



ARES PRISM has several user-definable coding structures that are used to categorize different types of records in the system.

These records include:

- Projects
- Control Accounts
- Budget Detail / Estimate Items
- Engineering Accounts
- Progress Accounts
- Equipment/Materials
- Purchase Orders
- Contracts
- Prime Contracts
- Schedule Activities

Benefits of additional coding:

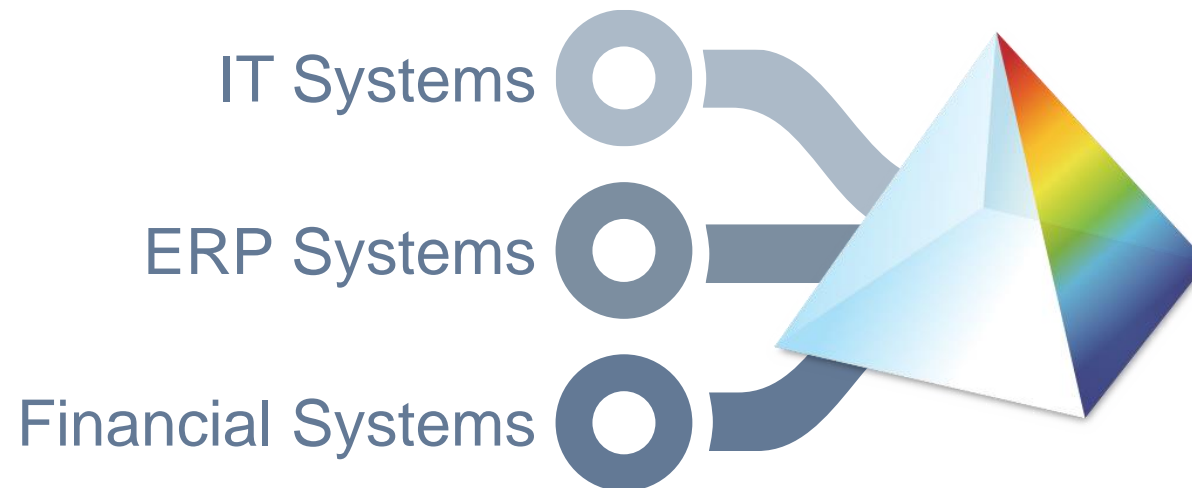
- Reporting based on grouping beyond breakdown structures
- Stores additional useful data about records / work packages

Lack of coding structures limits reporting options and makes it difficult to “roll-up” reports to more consumable levels

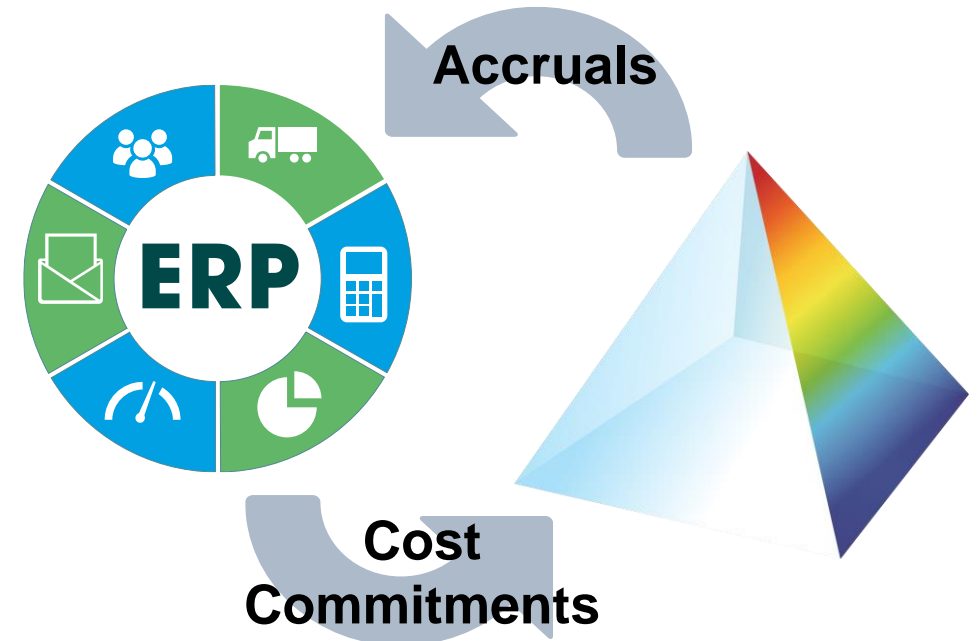
Question #2

How is project data entered into the system & exported?

A good project management system will collect all project data and information from various sources, spreadsheets, and applications to be the one source for all project data for the project management team.



- **Eliminates data silos**
- **Automates repeated tasks**
- The PRISM Integrator module provides **bi-directional integration** to nearly any existing legacy system or financial tool that an organization has. This enables an organization to pull all its project data together and automate data flow within its software tools.
 - IT Systems
 - ERP Systems
 - Financial Systems
 - Scheduling Systems
 - Legacy Systems



Question #3

What about automated workflows
& delegation of authority?

- Provides organizations with a complete and auditable system for tracking changes.
- Each ARES PRISM module can perform change management, so no matter which module(s) are implemented, all project changes are tracked and can be traced back to a single source of truth.



- Change approval workflows and delegation of authority.
- List of reviewers/approvers is set and the change is submitted for approval.
- Process for review and approval is managed automatically based on the review and approval methods configured for the project.
- Users are assigned action items as part of the change approval flow.



Paper

- Manual process involving paper change orders passed from desk to desk. Approvals are often delayed when paper goes unnoticed or is lost.

Email

- Paper-lite manual process where change orders are distributed via email for approval / digital signature. Emails are mixed in with spam and other communication and can be missed.

Automated

- Utilizes a system to manage the process that notifies and reminds users of their role in change approval with a combination of recurring email reminders, reminder pop-ups in PRISM, and an actions dashboard.

Question #4

How does the system handle reporting of overdue or overbudget projects?

- Overdue, over budget, negative, negative open commitment, and other similar issues are managed via built-in alert reports within ARES PRISM:
 - Invalid schedule dates/timing
 - Metrics indicating project work in or trending to variance
 - Negative estimate to complete and/or open commitment
 - Overbudget / Overplan
- Standard reports in PRISM can be customized and filtered to show only accounts with problems. Run regularly as an issue identification system.
- PRISM Integrator for automated notifications.



PRISM Dashboard graphically shows overspend and underspend on your project as well as s-curve of cost performance and more.

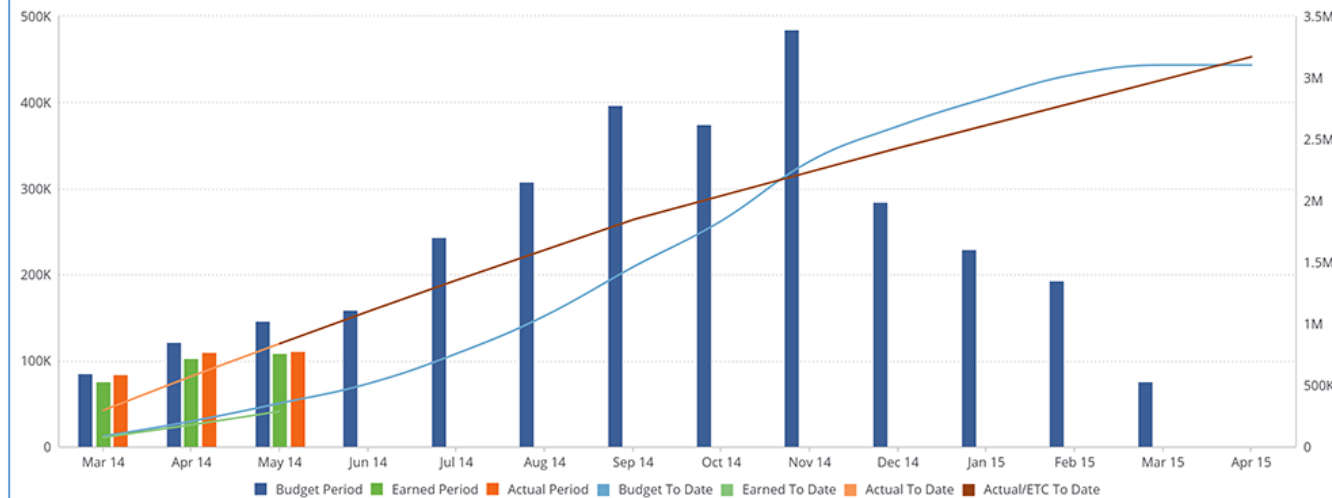
OverSpend

Group Description	Cost Variance	% Complete	CPI To Date
EPCM	-9.41K	22.88%	-0.01
Fuel Storage Pumps Supply	-4.96K	0.00%	-0.08
Potable Water Pump Supply	-7.2K	0.00%	-0.13
Unallocated Items	-11.5K	0.00%	-0.04

Under Spend

Group Description	Cost Variance	% Complete	CPI To Date
Bulk Piping Supply	0	0.00%	0.00
Bulk Valves Supply	0	0.00%	0.00
Civil - Structural Installation	0	0.00%	0.00
Electrical & Instrumentati...	0	0.00%	0.00
Freight Items	0	0.00%	0.00
Light Standard Supply	0	0.00%	0.00
Mechanical - Piping Install...	0	0.00%	0.00
Surveying Work	0	0.00%	0.00

Cost Performance



Question #5

What does an implementation involve and how long does it take?

- **In short, it depends on how prepared an organization is. ARES PRISM is truly out-of-the-box without any customization required.**
- **Depending on the size, scale, and readiness of the project data, ARES PRISM can be implemented in a matter of a few weeks:**
 - PRISM is installed and staff commences training
 - Once project data is cleaned, it is loaded manually through imports
 - Staff begins to analyze the project data with PRISM
 - Business processes are blended with project controls best practices
 - Meaningful reports are produced and data is published to the Dashboard

- **Ideally, organizations looking to combine data from multiple systems into PRISM G2 will have established coding in each systems that links data together. It is important to be able to identify data that belongs to a discrete set of work easily.**
- **Common steps to prepare data for a PMIS include:**
 - Complete work breakdown structure for all projects
 - Schedule data falls within WBS and is coded to match
 - Actual cost data is captured at Control Account detail or more detailed
- **Organizations with well-defined structures linking data together are typically able to implement PRISM G2 Cost Management within two months.**

Questions?

